

Regular Investment/Regular Draw-down Plan Form

OneAnswer Frontier Investment Portfolio

1 December 2023

OnePath Funds Management Limited (OnePath Funds Management)

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Customer Services

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Instructions

- This form should be completed if you would like to establish a Regular Investment Plan or a Regular Draw-down Plan. If you would like to establish both plans you must complete two separate forms. However, please note you cannot use both the Regular Investment Plan and the Regular Draw-down Plan for one investment fund at the same time.

Please nominate the type of plan you are requesting. Please cross (x) one of the following:

☐ Regular Investment Plan **or** ☐ Regular Draw-down Plan

Note: You cannot use both the Regular Investment Plan and the Regular Draw-down Plan for the same investment fund.

Important information

- The Regular Investment Plan allows you to add to your investment on a monthly or quarterly basis. Payments are automatically deducted from your nominated financial institution account.
- The Regular Draw-down Plan is an easy way for you to receive regular payments from your investment. You can elect to receive a fixed amount paid to your nominated account each month or quarter.
- Please refer to the current Product Disclosure Statement (PDS), and OneAnswer Frontier Investment Portfolio Additional Information Guide (available free of charge at onepathsuperinvest.com.au or by contacting your financial adviser or Customer Services on 133 665) for the terms and conditions relating to the Regular Investment Plan or Regular Draw-down Plan (including the Direct Debit Request Service Agreement on page 8 of this form).
- Please complete this form in CAPITAL LETTERS using black or blue pen and forward to: OneAnswer, OnePath, GPO Box 5306, Sydney NSW 2001 or email* to client@onepathsuperinvest.com.au

* Emails can only be accepted from the email address currently held on our records.

1. Investor details – please print

Investor number

Investor 1/Trustee 1

Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Other

Surname

Given name(s)
(including middle name)

Contact phone

Investor 2/Trustee 2

Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Other

Surname

Given name(s)
(including middle name)

Contact phone

1. Investor details – continued

Company/Partnership/Incorporated Association/Corporate Trustee

Name	<input type="text"/>
Contact person)	<input type="text"/>
Contact phone	<input type="text"/>

2. Nominated financial institution account for direct debit

Section 2 is for the Regular Investment Plan only

The following financial institution account will be debited for the Regular Investment Plan each month/quarter:

Name of financial institution	<input type="text"/>
Branch	<input type="text"/>
Account holder's name	<input type="text"/>
BSB	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>
Account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Direct Debit Request

I/We request and advise OnePath Funds Management Limited (user ID number: 217850) to debit my/our nominated account under the terms of the payment arrangement made between us.

I/We acknowledge that this direct debit arrangement is governed by the terms of the Direct Debit Request Service Agreement on page 8 and I/we agree to be bound by, authorise and acknowledge such terms.

I/We understand that where a Regular Investment Plan payment is dishonoured, a dishonour fee as described in the OneAnswer Frontier Investment Portfolio Additional Information Guide is charged and that a processing fee may also be charged by my/our financial institution each time a regular investment is made.

All bank account signatories must sign below.

Signature of account holder A (sign clearly within box)	<input type="text"/>	Date (dd/mm/yyyy)	<input type="text"/>
Signature of account holder B (sign clearly within box)	<input type="text"/>	Date (dd/mm/yyyy)	<input type="text"/>

Note: If the nominated account above is transferred, closed or the account details have changed, please complete a Change of Details Form and advise us 14 days before the Direct debit date.

3. Nominated financial institution account for direct credit

Section 3 is for the Regular Draw-down Plan only

Please provide details of the financial institution account you would like your regular payments to be paid into:

Name of financial institution	<input type="text"/>
Branch	<input type="text"/>
Account holder's name	<input type="text"/>
BSB	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>
Account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Note: Payments can only be made to a bank account held in the name of the investor(s).

4. Regular Investment Plan/Regular Draw-down Plan details

Please select **one** option below.

☐ I would like my regular investment or Regular Draw-down Plan to be made as per my nominated auto-rebalance profile (where applicable).

Regular amount \$

Frequency ☐ Monthly **or** ☐ Quarterly

Please continue to section 5.

☐ I would like to nominate the regular amount per investment fund in the section below.

Note:

- If you have the auto-rebalance plan nominated on your account and you invest in an investment fund that is not within your auto-rebalance profile, we will cancel the auto-rebalance plan.
- Transaction costs may apply when calculating 'buy' (issue) and 'sell' (redemption) unit prices.

Investment fund	Regular amount	Frequency		Distribution payment method		
		Monthly	Quarterly	Reinvest	Account	
Multi-manager investment funds						
Investor Profile 2 – Conservative						
MultiSeries 30 (SD18) [†]	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Conservative (SD51)*	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OptiMix Australian Fixed Interest (SD35)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Investor Profile 3 – Moderate						
MultiSeries 50 (SD36) [†]	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Balanced (SD05)*	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Investor Profile 4 – Growth						
MultiSeries 70 (SD19) [§]	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
MultiSeries 90 (SD20)**	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Active Growth (SD02)*	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Managed Growth (SD52)*	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Investor Profile 5 – High growth						
Australian shares						
OptiMix Australian Shares (SD15)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Global shares						
OptiMix Global Emerging Markets Shares (SD65)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OptiMix Global Shares (SD16)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Property						
OptiMix Property Securities (SD17)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

4. Regular Investment Plan/Regular Draw-down Plan details – continued

Investment fund	Regular amount	Frequency		Distribution payment method		
		Monthly	Quarterly	Reinvest	Account	
Single manager investment funds						
Investor Profile 1 – Defensive						
ANZ Cash Advantage (SD86)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Investor Profile 2 – Conservative						
Kapstream Absolute Return Income (SD64)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Conservative Index (SE09)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Diversified Bond Index (SD84)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Diversified Fixed Interest (SD37)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pendal Monthly Income Plus (SD66)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Perpetual Conservative Growth (SD44)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Schroder Fixed Income (SE06)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
UBS Diversified Fixed Income (SD49)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Investor Profile 3 – Moderate						
Ardea Real Outcome (SD81)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
First Sentier Global Credit Income (SD57)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Balanced Index (SE10)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Schroder Real Return (SD25)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
T. Rowe Price Dynamic Global Bond (SE18)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
UBS Defensive (SD47)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Investor Profile 4 – Growth						
Bentham Global Income (SD58)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
BlackRock Diversified ESG Growth (SD48)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
BlackRock Tactical Growth (SD26)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Alternatives Growth (SD74)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Growth Index (SE11)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Multi Asset Income (SD01)*††	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Perpetual Balanced Growth (SD45)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Schroder Sustainable Growth (SD46)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
UBS Balanced (SD29)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Investor Profile 5 – High-growth						
Multi-sector						
OnePath High Growth Index (SE12)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Australian shares						
Ausbil Australian Emerging Leaders (SD55)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Bennelong Australian Equities (SD76)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
BlackRock Advantage Australian Equity (SD59)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fidelity Australian Equities (SD80)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
First Sentier Imputation (SD24)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Greencap Broadcap (SE03)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Investors Mutual Australian Shares (SD41)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Merlon Australian Share Income (SD68)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Australian Shares (SD06)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
OnePath Australian Shares Index (SD77)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

4. Regular Investment Plan/Regular Draw-down Plan details – continued

Investment fund	Regular amount	Frequency		Distribution payment method	
		Monthly	Quarterly	Reinvest	Account
Single manager investment funds – continued					
Australian shares (continued)					
OnePath Blue Chip Imputation (SD03)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Emerging Companies (SD04)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Geared Australian Shares Index (SD71)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Select Leaders (SD38)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Sustainable Investments – Australian Shares (SD53)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pendal Australian Shares (SD79)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pendal Smaller Companies (SD60)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perennial Value Shares (SD61)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perpetual Australian Shares (SD27)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Perpetual ESG Australian Share (SD75)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder Australian Equity (SD40)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tyndall Australian Shares (SE07)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Global shares					
Altrinsic Global Equities (SE02)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Antipodes Global (Long only) (SD11)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Arrowstreet Global Equity (Hedged) (SD32)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barrow Hanley Concentrated Global Shares Hedged (SD30)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackRock Advantage International Equity (SD42)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Magellan Global (SD28)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MFS Global Equity (SD12)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Global Emerging Markets Shares (SD10)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Global Shares (SD08)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Global Smaller Companies Shares (SD34)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath International Shares Index (SD23)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath International Shares Index (Hedged) (SD78)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Platinum Asia (SE05)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Platinum International (SD43)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stewart Investors WorldWide Sustainability (SD70)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
T. Rowe Price Global Equity (SD83)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walter Scott Global Equity (Hedged) (SE08)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Property					
OnePath Australian Property Securities Index (SD67)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Global Property Securities Index (SD73)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Property Securities (SD07)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrastructure					
ClearBridge RARE Infrastructure Value Hedged (SD82)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Sentier Global Listed Infrastructure (SE04)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OnePath Global Listed Infrastructure Index (SE51)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

* This fund is closed to new investors from 25 July 2022.

† This fund was previously known as OptiMix Conservative.

‡ This fund was previously known as OptiMix Moderate.

§ This fund was previously known as OptiMix Balanced.

** This fund was previously known as OptiMix Growth.

†† This fund was previously known as OnePath Tax Effective Income.

4. Regular Investment Plan/Regular Draw-down Plan details – continued

Investment fund	Regular amount	Frequency		Distribution payment method	
		Monthly	Quarterly	Reinvest	Account
Other investment funds					
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total	\$ <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				

5. Declaration and signature(s)

By signing this form, I/we:

- confirm that I/we have read and agree to the terms in the current PDS which is available free of charge on onepathsuperinvest.com.au or by contacting Customer Services on 133 665
- acknowledge that there is additional information which forms part of the PDS in the form of the OneAnswer Frontier Investment Portfolio Additional Information Guide which includes additional information which may assist me/us in making my/our investment decision
- authorise the collection, use, storage and disclosure of my/our personal information (including where authorised and required, health and other sensitive information) as described in OnePath Funds Management's Privacy Policy which is available at onepathsuperinvest.com.au/about-us/privacy-policy or by calling Customer Services. If I/we have provided information about another person in this application, I/we declare that I/we have the permission of that person to do so. I/we understand that OnePath Funds Management require me/us to inform the person concerned that I/we have done so and direct them to the relevant Privacy Policy so they may understand the manner in which their personal information may be used and disclosed by OnePath Funds Management
- acknowledge that OnePath Funds Management or its related companies do not guarantee the repayment of capital, the performance of, or any rate of return of an investment in OneAnswer Frontier Investment Portfolio. I/We further acknowledge that my/our investment is subject to investment risk, including possible repayment delays and loss of income and principal invested
- acknowledge that OnePath Funds Management or its related group companies may be required to pass on my/our personal information or information about my/our investment to the relevant regulatory authority in compliance with the applicable laws and regulations such as the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* (Cth) and OnePath Funds Management or its related group companies can delay or decline to process a transaction and report it to the relevant regulatory authority if OnePath Funds Management or its related group companies is required to do so under the law
- acknowledge that I am/we are not aware and have no reason to suspect that my/our investment is derived from, related to or used to fund money laundering, terrorism financing and other similar activities and my/our instructions related to my/our investment will not result in OnePath Funds Management or its related group companies breaching any related laws or regulations in Australia or any other country
- authorise OnePath Funds Management and its related companies to use my/our personal information to send me/us information about their products or services from time to time. I/we also authorise OnePath Funds Management to disclose my/our personal information to organisations in an arrangement or alliance with OnePath Funds Management or its related companies, to share information for marketing purposes and to enable those alliance partners to send me/us information about their products and services. I/we understand that I/we may phone 133 665 to advise that I/we do not want my/our personal information used or disclosed by OnePath Funds Management, its related companies or alliance partners for marketing purposes
- authorise my/our financial adviser to receive and access my/our personal information for the purposes of managing my/our investment and to use the online service. Where there is any change relating to my/our financial adviser, I/we will notify OnePath Funds Management of the change in writing
- declare that the information completed on this form is true and correct.

Name of Investor 1/Director/Trustee

**Signature of Investor 1/
Director/Trustee**

(sign clearly within box)

Date (dd/mm/yyyy)

Name of Investor 2/

Director/Company Secretary/Trustee

Signature of Investor 2/

Director/Company Secretary/Trustee

(sign clearly within box)

Date (dd/mm/yyyy)

If signed under power of attorney, the attorney certifies that he or she has not received notice of revocation of the power of attorney. Please include a certified copy of the power of attorney with this form.

In the case of company secretaries, two directors or a director and a company secretary must sign, unless you are a sole director and sole company secretary.

For partnerships, please ensure all partners sign.



Direct Debit Request Service Agreement

OneAnswer Frontier Investment Portfolio

1 December 2023

OnePath Funds Management Limited (OnePath Funds Management)

ABN 21 003 002 800 AFSL 238 342

GPO Box 5306, Sydney NSW 2001

Customer Services

Phone 133 665

Email client@onepathsuperinvest.com.au

Website onepathsuperinvest.com.au

Please keep this document in a safe place.

Our commitment to you

Drawing arrangements:

- Where the due date falls on a non-business day, we will draw the amount on the next business day.
- We will not change any details of drawings arrangements without giving you at least fourteen (14) days written notice.
- We reserve the right to cancel the OnePath Funds Management Limited drawing arrangements if three or more drawings are returned unpaid by your nominated Financial Institution and to arrange with you an alternate payment method.
- We will keep all information pertaining to your nominated account at the Financial Institution, private and confidential unless otherwise required by the Bulk Electronic Clearing System (BECS) rules. You acknowledge that we may be required to disclose details of your direct debit request to our sponsor bank to assist with the checking of any incorrect or wrongful debits to your nominated account.
- We will only arrange for funds to be debited from your account as authorised in the Direct Debit Request.

Your rights

- You may terminate the OnePath Funds Management Limited drawing arrangements at any time by giving written notice directly to us, or through your nominated Financial Institution. Notice given to us should be received by us at least 14 days prior to the due date.
- You may stop payment of a drawing under the OnePath Funds Management Limited arrangement by giving written notice directly to us, or through your nominated Financial Institution. Notice given to us should be received by us at least 14 days prior to the due date.
- You may request change to the drawing amount and/or frequency of OnePath Funds Management Limited drawings by contacting us and advising your requirements no less than 14 days prior to the due date.
- Where you consider that a drawing has been initiated incorrectly (outside the OnePath Funds Management Limited arrangements), you should notify us directly as soon as possible so that we can resolve your query. Alternatively you can take it up directly with your financial institution.
 - If we reasonably conclude as a result of our investigations that your account has been incorrectly debited we will respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We will also notify you in writing of the amount by which your account has been adjusted.
 - If we reasonably conclude as a result of our investigations that your account has not been incorrectly debited we will respond to your query by providing you with reasons and any evidence for this finding in writing.

Your commitment to us

Your responsibilities:

- You should check:
 - with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions
 - your account details which you have provided to us are correct by checking them against a recent account statement
 - with your financial institution before completing the Direct Debit Request if you have any queries about how to complete the Direct Debit Request

- It is your responsibility to ensure that sufficient funds are available in the nominated account to allow a debit payment to be made in accordance with the Direct Debit Request. If there are insufficient funds in your account to meet a debit payment:
 - a) You may be charged a fee and/or interest by your financial institution
 - b) You may also incur fees or charges imposed or incurred by us; and
 - c) You may arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.
- It is your responsibility to ensure that the authorisation given to draw on the nominated account is identical to the account signing instruction held by the Financial Institution where the account is based
- It is your responsibility to advise us if the account nominated by you to receive the OnePath Funds Management Limited drawings is transferred or closed
- It is your responsibility to arrange with us a suitable alternate payment method if you wish to cancel the OnePath Funds Management Limited drawing